



Office of the State Long-Term Care

OMBUDSMAN

Established within the Iowa Department on Aging

Iowa Office of the State Long-Term Care Ombudsman

Volunteer Ombudsman Program

Peer Group Facilitator's Manual

Last updated February 2015

The mission of the Office of the State Long-Term Care Ombudsman is to protect the health, safety, welfare, and rights of individuals residing in long-term care by investigating complaints, seeking resolutions to problems, and providing advocacy with the goal of enhancing quality of life and care.

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Introduction

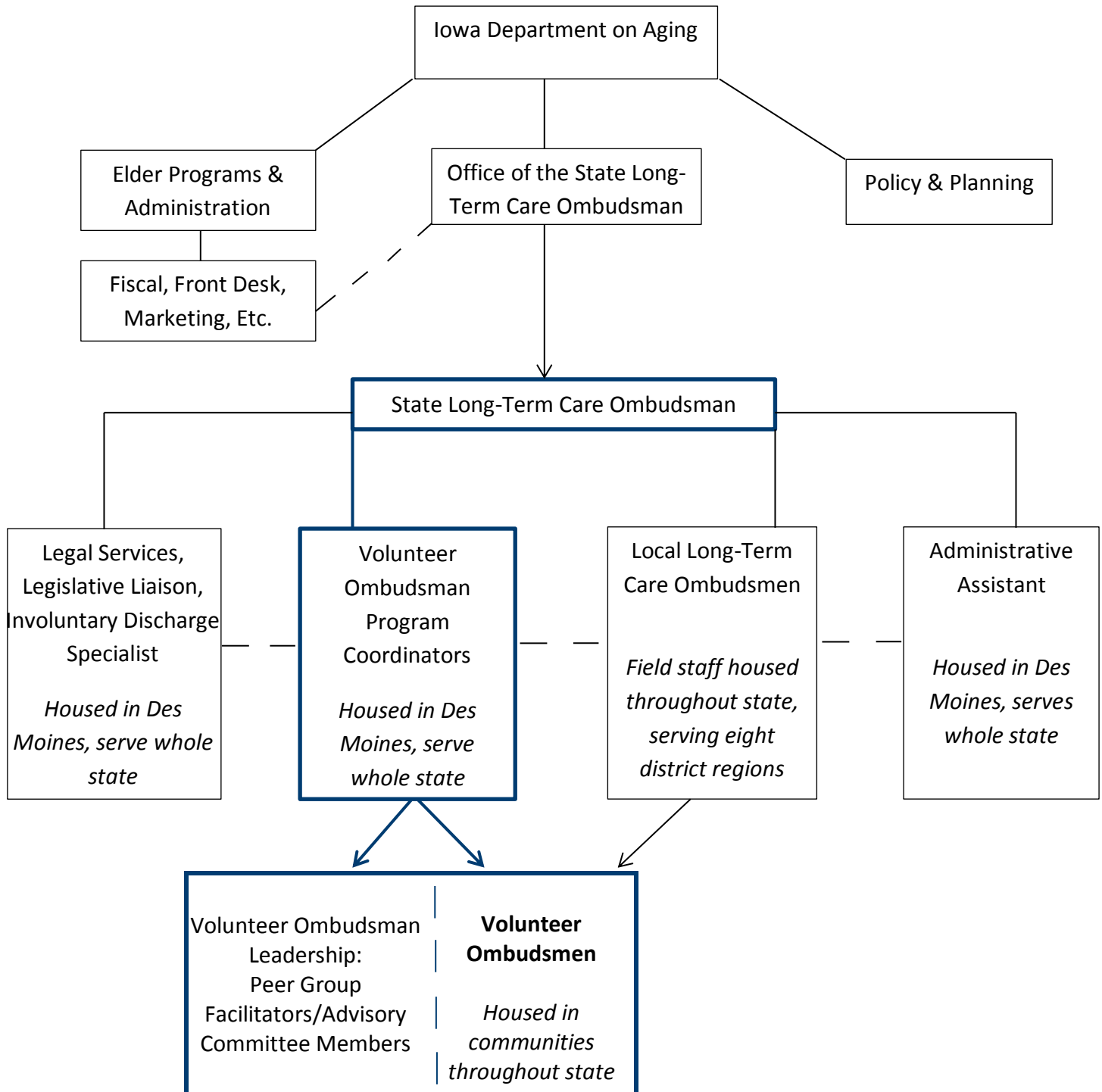
The Volunteer Ombudsman Program (VOP) is ready to implement two new initiatives for volunteers to better connect and receive support within the program. The overall goal of these initiatives is to increase volunteer engagement and retention. These initiatives include:

- **Peer Groups:** The purpose of Peer Groups is to bring local Volunteer Ombudsmen together to discuss their experiences and continue to learn from one another. The VOP hopes to create a network of like-minded individuals who will be able to support one another through their Volunteer Ombudsman service.
- **State Volunteer Ombudsman Advisory Committee:** This Committee will assist the Volunteer Coordinators as the program grows by providing input, feedback, and perspective regarding program functionality, growth, and new initiatives.

These initiatives are designed to go hand in hand. Selected Volunteer Ombudsmen who serve as Peer Group Facilitators are a natural fit to serve on the Statewide Volunteer Ombudsman Advisory Committee.

Iowa Department on Aging & Office of the State Long-Term Care Ombudsman:

Basic Organizational Chart

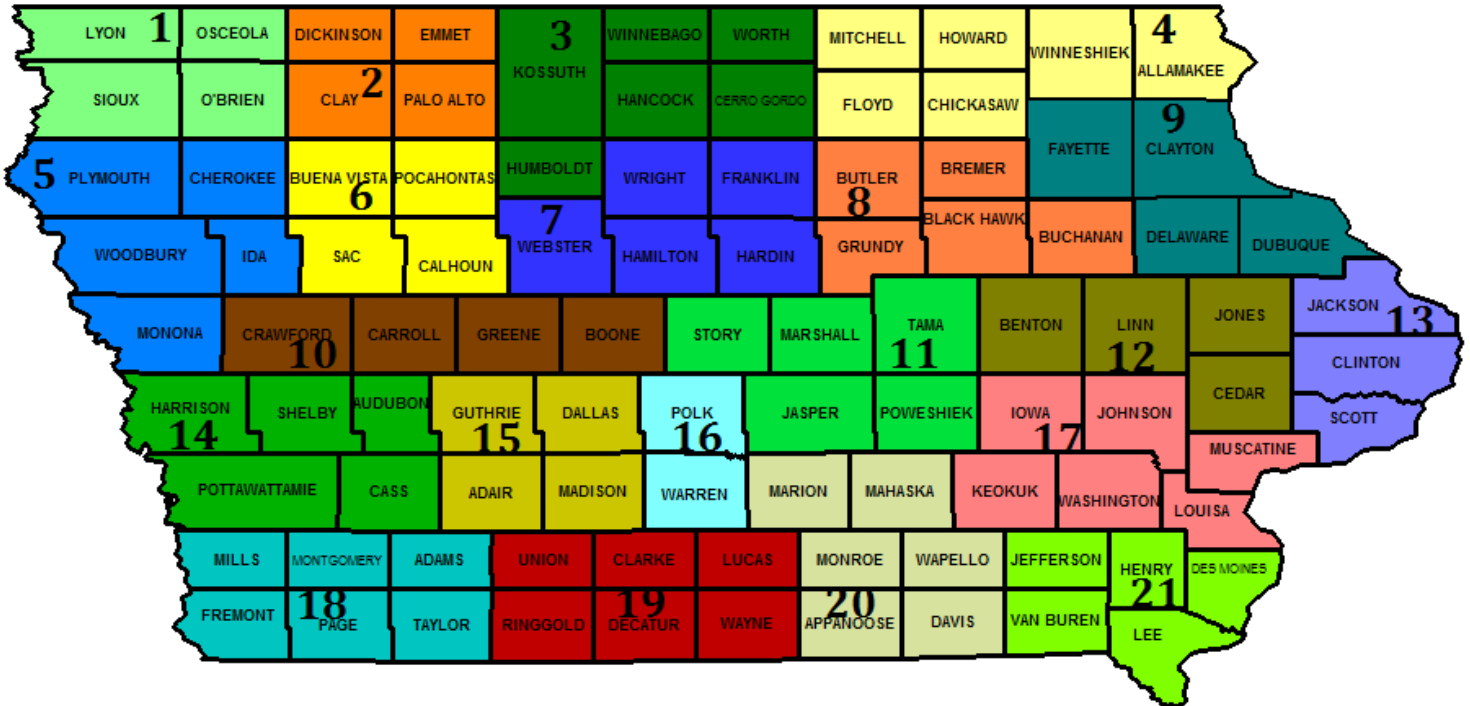


Peer Groups

The goals of Peer Groups are to:

- I. Create a support network for Volunteer Ombudsman around the state of Iowa.
- II. Strengthen the chain of communication between Volunteer Ombudsmen, Volunteer Ombudsman Coordinators, Local Long-Term Care Ombudsmen, and the State Long-Term Care Ombudsman.
- III. Provide in-person continuing education opportunities for volunteers. Volunteers may count Peer Group meeting attendance towards their continuing education requirements for recertification.
 - a. Decrease the dependence on Volunteer Coordinators to plan opportunities around the state for volunteers to meet continuing education requirements.
 - b. Increase the amount of continuing education opportunities for Volunteer Ombudsman to fulfill their continuing education requirements in order to renew their certification.
- IV. Create a sense of community within the VOP. Participating Volunteer Ombudsmen are more likely to feel engaged with the VOP. Engaged volunteers are more motivated, less likely to burn out, and stay with a program longer.

Peer Group Region Map & Current Facilitators



Peer Group 1 Not active	Peer Group 2 Not active	Peer Group 3 Not active	Peer Group 4 Not active	
Peer Group 5 Not active	Peer Group 6 Not active	Peer Group 7 Not active	Peer Group 8 Mary Ann Riensche	Peer Group 9 Not active
	Peer Group 10 Not active	Peer Group 11 Andy Webb	Peer Group 12 Margo Jarosz	Peer Group 13 Not active
Peer Group 14 Not active	Peer Group 15 Not active	Peer Group 16 Shirley Sorenson	Peer Group 17 Janice Frey	
Peer Group 18 Not active	Peer Group 19 Not active	Peer Group 20 Not active	Peer Group 21 Not active	

Guidelines for Peer Group Meetings

Group Composition: All Volunteer Ombudsmen serving within the designated region.

Volunteer Ombudsman living in one region but serving in another, or who would rather attend a Peer Group meeting that is held closer to them than their own region, may elect to attend a different Peer Group meeting.

Frequency: No less than quarterly.

Length: A successful meeting length is about one to one-and-a-half hours, but this may vary.

Meetings should generally take at least one hour. Every meeting should be started promptly and finish on time.

Date and Time: It is recommended that each local Peer Group establish a consistent meeting day and time, so that group members can plan well in advance. For example, a Peer Group may choose to meet at 6 p.m. the first Tuesday of February, May, August, and November. A handy online tool that can be used to poll participants about the best option for a meeting date is www.doodle.com.

Location: The location may remain consistent or may change each meeting. There are some important parameters the Facilitator needs to consider when planning a location. If requested, a VOP Coordinator would be happy to assist Facilitators with locating an appropriate space.

- **Centrality/Convenience:** A location that is as central or convenient as possible for the volunteers currently active in your region, as a courtesy to volunteers who may be serving in rural areas.
- **Privacy:** Given that sensitive and/or confidential information may be discussed at these meetings, facilitators should do their best to choose a venue for the meeting that is conducive to maintaining confidentiality.
 - The meeting venue would ideally have a door that can shut, and/or where only Volunteer Ombudsman can hear the discussion.
 - If a private venue is not available, meeting attendees are not permitted to name their facility or the names of any parties affiliated with the facility.

Refreshments: Refreshments are encouraged and can help people interact. Group members may alternate bringing treats to meetings, provided the meeting venue allows it. Please be mindful of the dietary and allergy restrictions of group members.

Leadership Roles

Facilitator(s):

- Must have reliable access to computer, e-mail, and internet.
- Receives a brief virtual training after their appointment is made.
- Serves for one calendar year. May be nominated for extended term if no other Peer Group member is willing to serve as Facilitator.
- Attends quarterly conference calls with VOP Coordinators to discuss learning material selected for the upcoming quarter.
- Coordinates meeting date, time, and venue no less than once a quarter.
- Sends e-mail/phone invitations and reminders to all Peer Group participants (including VOP Coordinator and Local Long-Term Care Ombudsman).
- Presides effectively at meetings, facilitates agenda items, and manages discussion.
- May suggest that a co-facilitator be nominated to serve, if their Peer Group is quite large. Responsibilities should be divided appropriately.
- Serves on State Volunteer Ombudsman Advisory Committee. If a Peer Group has co-facilitators, both may serve on the Advisory Committee if they wish.

Secretary:

- Serves for one calendar year. May be nominated for extended term if no other Peer Group member is willing to serve as Secretary.
- Takes meeting notes via pen/paper or electronic word processing. **Recording the meeting via video and/or audio is not permitted.**
- Keeps complete and accurate minutes of all meetings and sends copy to Facilitator and VOP Coordinator within one week of meeting.
 - Minutes should **not** include resident or facility names.
- May submit interesting reports and group activities to Volunteer Ombudsman Coordinator as best practices for other Peer Groups.

Leadership Appointment Process:

- Peer Groups will nominate volunteers to serve as the upcoming Facilitator and Secretary during the last meeting of the calendar year.
- Members do not need to be present for nominations but they do need to accept their nomination (either by phone or e-mail).
- The current Secretary collects nominations and makes sure that each candidate accepts the nomination. Once all have accepted or declined, final nominations are provided within the meeting minutes.
- VOP Coordinators will review nominations and provide approval as appropriate. They will announce the leadership appointees within each Peer Group.

Agenda

The following meeting content should generally be included. Samples and templates can be referenced on page 10-11 of this manual.

I. Welcome

- a. Sign in and confidentiality reminder
- b. Introductions: Name, Facility, etc.
 - i. Welcome new volunteers
- c. Icebreaker: Fun questions, etc.

II. Business

- a. Review of last meeting's minutes and notes, questions followed up on, etc.
- b. Announcements
 - i. VOP announcements
 - ii. Group announcements
- c. (If last meeting of the calendar year) Nominate next Facilitator and Secretary

III. Learning Program

Facilitators will lead group activity/discussion; topic pre-selected and prepared by VOP Coordinators. Any learning material (including guest speakers) beyond the pre-selected and prepared VOP material should be approved by a VOP Coordinator prior in advance of the meeting.

IV. Collaboration

- a. Successes and Challenges: Group members can briefly share best practices or request advice regarding challenges they are experiencing.
- b. A semi-unstructured time for volunteers to visit, get to know each other, discuss upcoming events and program issues.

Support from the VOP

The role of the VOP Coordinators in the Peer Group process is to:

- Maintain general oversight over Peer Groups.
- Select a new Peer Group's inaugural Facilitator when the region has enough volunteers to support an effective Peer Group.
- Train Peer Group Facilitators and provide any ongoing support requested.
- Coordinate a quarterly virtual meeting of Facilitators to present upcoming meeting material.
- Provide copies of learning materials, updated volunteer contact information, sign-in sheets, and other important information to Facilitators as requested.
- Collect, read, and archive minutes, agenda, and other notes sent by Secretaries.
- Review leadership nominations, approve positions as appropriate, and announce new appointees; provide for a smooth transition of leadership.

Note: Although VOP Coordinators and Local Long-Term Care Ombudsmen will maintain a standing invitation to Peer Group meetings, they will likely not be attending unless there is a specific reason for them to be present.

Peer Group Meeting Sample Agendas

Peer Group Meeting: Region 8

September 9, 2014; 6 p.m.

Pleasantville Public Library, Meeting Room A

Welcome

Introductions (Name, Facility, & favorite candy bar)

New Volunteers: John Doe – Sunnyside; Sarah Ford – Hope Springs

Business

Overview of July meeting; follow-up to outstanding questions

New VOP Policy

Personal announcements from the group

Learning Program: Biology of Aging Part 1

Handout - National Institute on Aging Booklet: Aging under the Microscope & Genetics

Review, Activity, and Discussion

Collaboration:

Successes/Challenges – sharing and discussion

Open forum – questions and comments

Networking

Next Meeting: November 30, 2014 – 6 p.m., location TBD

Peer Group Meeting: Region 8

November 30, 2014; 6 p.m.

Grant County Hospital, Meeting Room 3

Welcome

Introductions (Name, Facility, & favorite animal)

New Volunteers: Jolene Heart – St. Michael's

Business

Overview of September meeting; follow-up to outstanding questions

Personal announcements from the group

Nominate 2015 Facilitator and Secretary

Learning Program: Biology of Aging Part 2

Handout - National Institute on Aging Booklet: Metabolism, Immune System, Research

Review, Activity, and Discussion

Collaboration:

Successes/Challenges – sharing and discussion

Open forum – questions and comments

Networking

Next Meeting: March 2, 2015 – 6 p.m.

Peer Group Meeting Agenda Template

Peer Group Meeting Information: _____

- Welcome

- Introductions (Name, Site) _____

- Fun Question: _____

- New Volunteers: _____

- Business

- Overview of _____ Meeting

- Announcements _____

- Learning Program _____

- Material: _____

- Talking Points/Activities: _____

- _____

- _____

- Collaboration:

- Successes/Challenges

- Questions & Comments

- Networking

State Volunteer Ombudsman Advisory Committee

The goals of the State Volunteer Ombudsmen Advisory Committee are to:

- I. Receive direct feedback from Volunteer Ombudsmen across the state about the overall volunteer experience, program functionality, and proposed new initiatives.
- II. Provide participating Volunteer Ombudsmen with an opportunity for growth, engagement, and continuing education.
- III. Strengthen the chain of communication between all Volunteer Ombudsmen and Volunteer Ombudsman Coordinators.

Guidelines for Advisory Committee

Committee Composition: The Facilitators of every Peer Group will be a member of the State Volunteer Ombudsman Advisory Committee. VOP Coordinators will coordinate and facilitate these meetings.

Frequency: No less than quarterly, usually at the beginning of the calendar-year quarter. These meetings are intended to occur concurrently with the quarterly Peer Group Facilitator meetings that introduce the upcoming quarters' learning material.

Length: Previous Advisory Committee meetings have lasted between 30 minutes and 1 hour. Meetings will start promptly and finish on time, or as soon as listed business is complete.

Date and Time: To be determined by the VOP Coordinator in consultation with Advisory Committee members until a regular meeting day and time is necessary.

Location: The location of the meeting for most participants is virtual, either conference call or webinar. Those local to Des Moines/Central Iowa are invited to attend in person if they wish.

Agenda

A typical Advisory Committee meeting will include the following items for discussion.

I. Welcome/

- a. Introductions: Name, Facility, etc.
- b. Icebreaker: Fun questions, etc.

II. Business

- a. Remarks on most recent Peer Group meetings
- b. VOP census; recruitment/retention update
- c. VOP announcements & discussion

III. Learning Program Introduction

- a. VOP Coordinators will present and discuss educational materials for next Peer Group meeting
- b. Facilitator Q&A

IV. Collaboration

- a. Successes and Challenges: Group members can briefly share best practices or request advice regarding challenges they are experiencing as a Peer Group Facilitator.
- b. Comments, questions, and concerns

Support from the VOP

The role of the VOP Coordinators in the State Volunteer Ombudsman Advisory Committee is to:

- Confirm meeting date and time.
- Arrange physical and virtual meeting venue.
- Send e-mail invitations and reminders to Facilitators/Advisory Committee members.
- Develop meeting agenda and materials and send in advance.
- Preside effectively at meetings.
- Train new Facilitators to lead group discussion and guide learning program for their Peer Groups.
- Provide information and assistance regarding isolated and widespread concerns regarding program functionality, policies, and practices to Facilitators/Advisory Committee members.
- Present new program initiatives to Facilitators/Advisory Committee members and acknowledge feedback.